



Business Process Guide: Special Project Agreement (New) in DocuSign

Overview

This document provides step by step instructions to complete the Special Project Agreement through DocuSign.

The Special Project Agreement, between University Corporation at San Francisco State University and the project account holders, operates in compliance with California Administrative Code Title V, Section 42500, the ICSUAM, and the policies of the University Corporation. This agreement defines the parameters and scope of the project, and lists the potential sources of revenue and types of expenses.


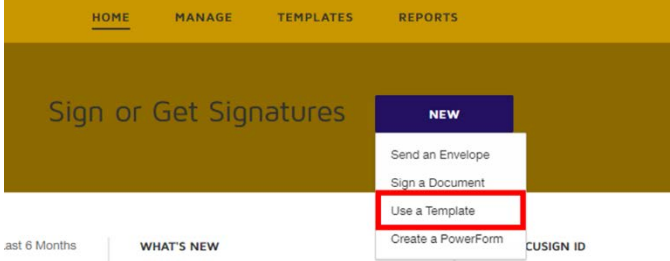
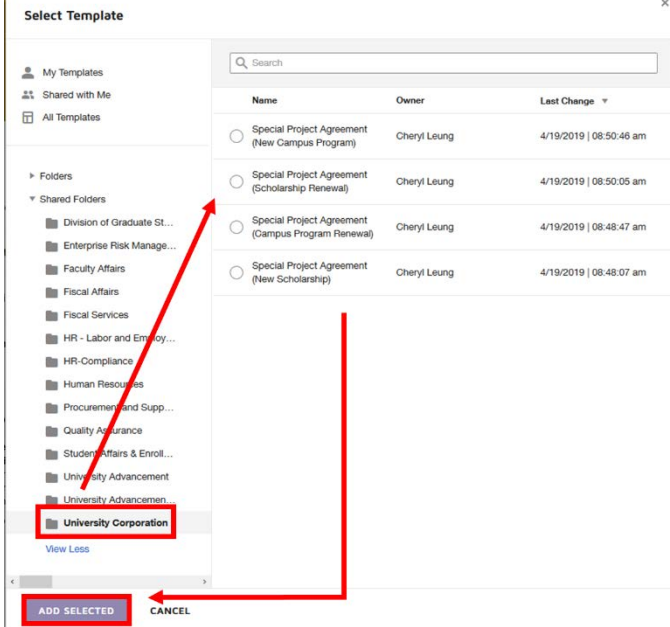
For general questions regarding Special Project Agreement, please contact Kathleen Bruno at kbruno@sfsu.edu or 415.338.7920, or Shelby Zuo at zuo@sfsu.edu or 415.338.7783.

For general questions regarding DocuSign, please visit [DocuSign @ San Francisco State](#) or contact Quality Assurance at gateam@sfsu.edu.

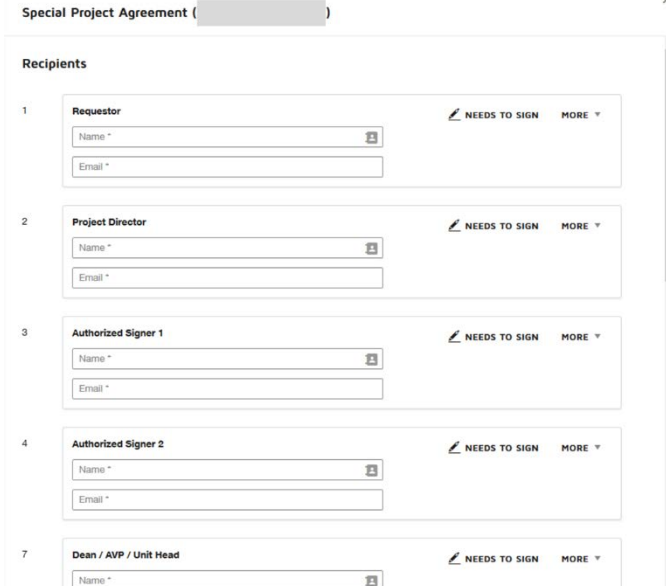
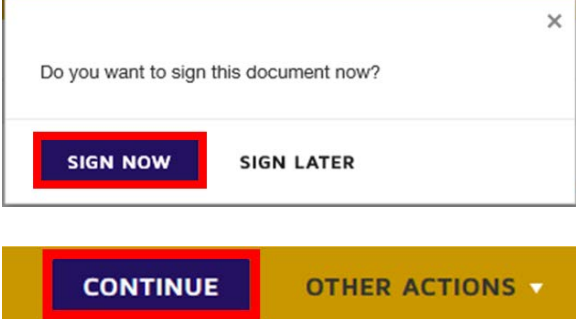
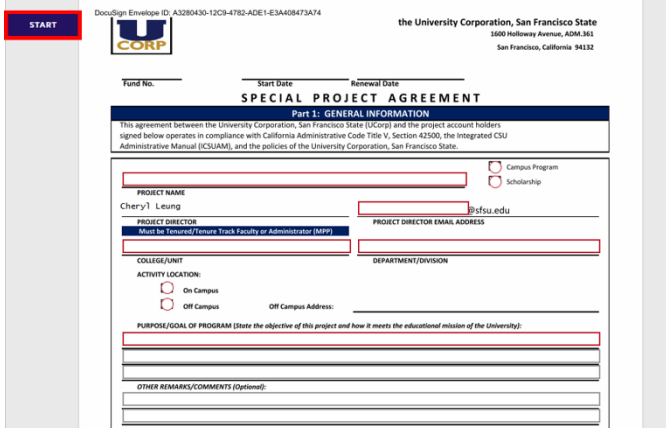

Procedures for Requester

Steps	Examples
1. To access SFSU’s DocuSign homepage, please go to https://account.docusign.com/	
2. Enter your SFSU email address and select CONTINUE .	

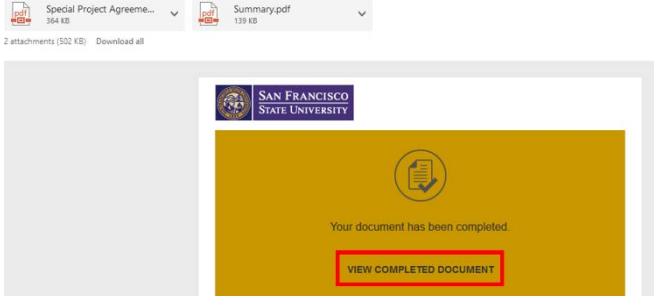


Steps	Examples															
<p>3. Enter your San Francisco State email address & select CONTINUE. Enter your San Francisco State ID or email address and password to access your DocuSign account.</p>	 <p>The screenshot shows the 'SF State Global Login' page. At the top left is the San Francisco State University logo. Below it is the text 'SF State Global Login'. There are two input fields: 'SF State ID or Email' and 'SF State Password'. Below the fields is a blue 'Login' button. At the bottom, there is a link that says 'Get help signing in'.</p>															
<p>4. From the DocuSign homepage, click on the NEW button and then select USE A TEMPLATE from the drop down menu.</p>	 <p>The screenshot shows the DocuSign 'Sign or Get Signatures' page. At the top, there are navigation tabs: HOME, MANAGE, TEMPLATES, and REPORTS. Below the tabs is a large blue button labeled 'NEW'. A dropdown menu is open from the 'NEW' button, showing options: 'Send an Envelope', 'Sign a Document', 'Use a Template' (highlighted with a red box), and 'Create a PowerForm'. At the bottom right, there is a 'CUSIGN ID' field.</p>															
<p>5. Under Shared Folders, choose University Corporation. Check the box for either Special Project Agreement (New Campus Program) or Special Project Agreement (New Scholarship). When you are done, click ADD SELECTED.</p>	 <p>The screenshot shows the 'Select Template' dialog box. On the left, there is a tree view of folders. Under 'Shared Folders', the 'University Corporation' folder is selected and highlighted with a red box. Below the tree view is a 'View Less' link. On the right, there is a table of templates. The table has columns for 'Name', 'Owner', and 'Last Change'. The first two rows are selected with radio buttons. At the bottom of the dialog, there are two buttons: 'ADD SELECTED' (highlighted with a red box) and 'CANCEL'.</p> <table border="1"><thead><tr><th>Name</th><th>Owner</th><th>Last Change</th></tr></thead><tbody><tr><td><input type="radio"/> Special Project Agreement (New Campus Program)</td><td>Cheryl Leung</td><td>4/19/2019 08:50:46 am</td></tr><tr><td><input type="radio"/> Special Project Agreement (Scholarship Renewal)</td><td>Cheryl Leung</td><td>4/19/2019 08:50:05 am</td></tr><tr><td><input type="radio"/> Special Project Agreement (Campus Program Renewal)</td><td>Cheryl Leung</td><td>4/19/2019 08:48:47 am</td></tr><tr><td><input type="radio"/> Special Project Agreement (New Scholarship)</td><td>Cheryl Leung</td><td>4/19/2019 08:48:07 am</td></tr></tbody></table>	Name	Owner	Last Change	<input type="radio"/> Special Project Agreement (New Campus Program)	Cheryl Leung	4/19/2019 08:50:46 am	<input type="radio"/> Special Project Agreement (Scholarship Renewal)	Cheryl Leung	4/19/2019 08:50:05 am	<input type="radio"/> Special Project Agreement (Campus Program Renewal)	Cheryl Leung	4/19/2019 08:48:47 am	<input type="radio"/> Special Project Agreement (New Scholarship)	Cheryl Leung	4/19/2019 08:48:07 am
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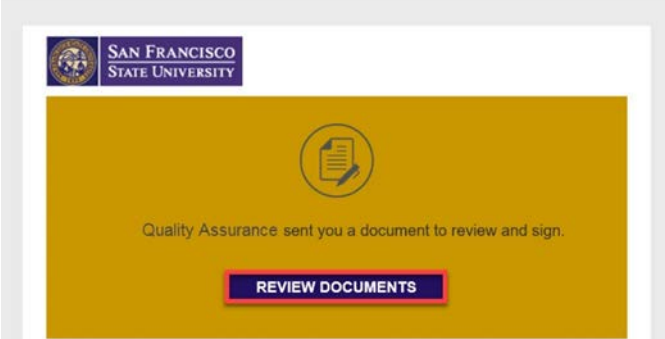
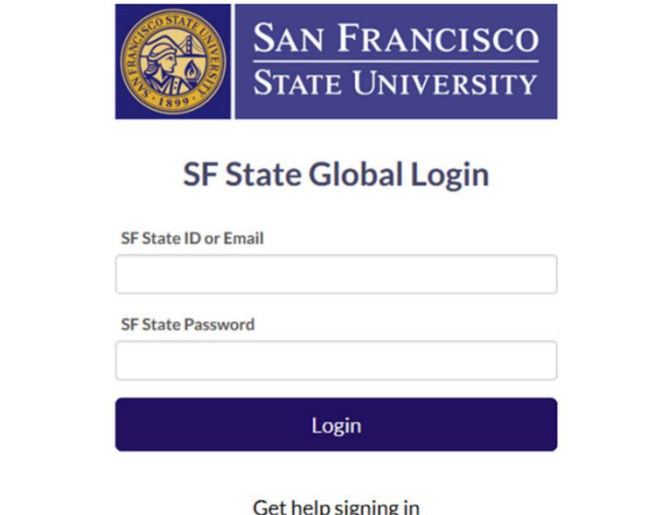


Steps	Examples
<p>6. Assign recipient contact information (e.g. add yourself as Requestor). If there is only one authorized signer, you may remove any unnecessary recipient by hovering over the right side of the recipient and clicking on the X to delete them and their assigned fields. For more information, please see http://docuSign.sfsu.edu/content/add-or-remove-recipients-workflow-template. When complete, click SEND at the bottom left corner of the page.</p>	
<p>7. Click SIGN NOW and then CONTINUE in DocuSign.</p>	
<p>8. Select START to begin filling out required information.</p>	
<p>9. Click FINISH when you are done.</p>	



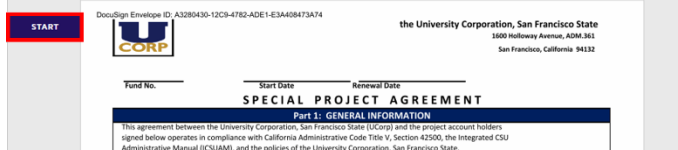

Steps	Examples
<p>10. When the transaction is completed, you will receive a DocuSign email notification with the signed document and transaction summary attached. You may also access the signed document in your DocuSign account by selecting VIEW COMPLETED DOCUMENT.</p>	 <p>The screenshot shows an email interface with two attachments: 'Special Project Agree...' (364 KB) and 'Summary.pdf' (139 KB). Below the attachments is a yellow banner with the San Francisco State University logo, a document icon, and the text 'Your document has been completed.' A red box highlights the 'VIEW COMPLETED DOCUMENT' button.</p>

Procedures for Signers

Steps	Examples
<p>1. To access the Special Project Agreement, open the DocuSign email and select REVIEW DOCUMENTS.</p>	 <p>The screenshot shows an email interface with the San Francisco State University logo and a yellow banner with a document icon and the text 'Quality Assurance sent you a document to review and sign.' A red box highlights the 'REVIEW DOCUMENTS' button.</p>
<p>2. Enter your San Francisco State email address & select CONTINUE. Enter your San Francisco State ID or email address and password to access your DocuSign account.</p>	 <p>The screenshot shows the 'SF State Global Login' page. It features the San Francisco State University logo and two input fields: 'SF State ID or Email' and 'SF State Password'. Below the fields is a blue 'Login' button. At the bottom, there is a link that says 'Get help signing in'.</p>



The University Corporation
San Francisco State University
PO Box 320160
San Francisco, CA 94132

Steps	Examples
3. Select START to begin reviewing the Special Project Agreement.	
4. Click FINISH at the top right to complete your review of the document.	
5. When the transaction is completed, you will receive a DocuSign email notification with the signed document and transaction summary attached. You may also access the signed document in your DocuSign account by selecting VIEW COMPLETED DOCUMENT .	